
LEARNING & DEVELOPMENT EXECUTIVE

INNOVATION | CHANGE | PERFORMANCE IMPROVEMENT

Innovative business leader who creates practical and powerful learning solutions to help businesses work smarter – delivering “*learning at the speed of need.*” Builds great teams that deliver clear business results. Creates a tangible vision for the way learning needs to occur in today’s dynamic and global business environment. Multiple award-winner for conceiving and implementing blended eLearning solutions.

- **New Media Technologies**
- **Global Resource Management**
- **Strategic & Tactical Business Planning**
- **Budget Control**
- **Instructional Design**
- **eLearning Efficiencies**

INDUSTRY EXPERTISE

USDLA 2011 Outstanding Leadership award winner

ELearning! Learning 100 award, 2011

ASTD Excellence in Practice citation, 2011

Bersin Learning Leaders honorable mention, 2011

Adobe & Bersin case studies, 2011

Online Educa Berlin, Business Keynote, 2010

ASTD Technology Showcase, Keynote, 2010

Adobe Learning Summit, Session Speaker, 2011

CLO Spring Symposium, Session Speaker, 2011

Bersin IMPACT, Learning Technologies Panelist, 2011

PERFORMANCE SCORECARD

Learning Innovation: Conceived and launched award-winning blended learning capabilities and strategy known as the “Knowledge Network” adopted as cornerstone in company’s new sales and service operating model.

Driving for Results: Increased customer satisfaction rating to 85% favorability, extended reach to 29% more clients, reduced staffing requirements by 53% and generated \$20M+ annual budget reduction.

Global Standards: Established global consistency and best practices for previously disparate regional training model. Recruited 6-member team with functional responsibility for 850-person worldwide organization.

Performance Improvement: Implemented Sales Performance Academy to reinvigorate 500-person North American Sales organization resulting in 10% improvement in closure rates and client retention.

CAREER SYNOPSIS

JPMORGAN CHASE

Wilmington, DE, 2011 – present

Head of Instructional Design & Learning Technologies; Wilmington, DE (2011-present)

Set strategic direction for learning organization. Led 7 direct reports and provided functional leadership to 85 person global organization tasked with design, development and deployment of training programs across multiple lines of business for the bank

- Develop, build and lead a high performing team of professionals to create training capabilities to improve performance for 36,000+ frontline staff and managers.
- Stay current with training industry best practices and technology for benchmarking.

JPMORGAN CHASE *(continued)*

- Design operating model, processes and control standards to deliver learning with consistency and quality.
 - Implemented formal training engagement process with business requestors.
 - Led Demand Management work stream to implement consistent process spanning centralized training organizations.
- Evaluate current training and drive teams to design programs with innovative curricula and learning modalities.
 - Reduced reliance on printed classroom materials resulting in \$250,000 savings annually.
 - Enhanced eLearning curriculum resulting in 7% year over year growth.
 - Reduced Customer Service New Hire curriculum by 40 hours for faster time to competency.

THOMSON REUTERS

New York, NY | London, UK, 2008 – 2011

Global Head of Client Training, New York | London

Led 6 direct reports and provided functional leadership to 850-person global organization tasked with improving remote training methodologies. Managed a \$5M budget with functional oversight for \$80M globally.

- Directed cross-functional teams to design, develop, and deliver improved training capabilities known as the Knowledge Network including:
 - A new virtual platform resulting in a more robust and elegant client experience.
 - Enhanced eLearning curriculum with increased interactive engagement for customers.
 - Inaugural use of video training within client training organization.
- Led client-learning experience for next generation product launch. Established training strategy for deployment to 186,000 end users over 2-year timeframe.
- Generated corporate savings in excess of \$20M annually, reduced staffing requirement by 53% and created capacity to transition new roles for production staff and account team coverage.

THOMSON FINANCIAL

New York, NY, 2003 – 2008

Managing Director, Client Education Group; New York, NY (2004 – 2008)

Built strong management team responsible for 60-member organization handling client training in the Americas for Thomson Financial workflow solutions.

Regional Director, Client Education Solutions; Lawrenceville, NJ (2003 – 2004)

Orchestrated activities of 65 field-based training specialists supporting 18,000 end users throughout North and South America for a technology platform upgrade.

MERRILL LYNCH

Princeton, NJ | Oakland, CA, 1994 – 2003

Vice President, Consultative Training Services; Princeton, NJ (1997 – 2003)**Financial Consultant; Oakland, CA (1994 – 1997)**

EDUCATION AND CERTIFICATIONS

MBA, BS, Business Administration, California Coast University, Santa Ana, California

MS Office certified, Siebel 7 CRM, ACT, HTML Basic

PROFESSIONAL AFFILIATIONS

American Society for Training & Development (ASTD) • European Learning Industry Group (ELIG)

The eLearning Guild • International eLearning Association (IELA) • International Distance Learning Association (DLA)